Bulk Service Order Generation:

The generation of Service Orders can be done in bulk using the *Generate Service Orders* feature in SAMS. Select users at each agency to use this feature in SAMS. Users have the ability to filter the selection of orders to be generated based on Service Month, Agency, Providers, Services, and Care Programs. Organizational security ensures that users can only generate service orders for their agency.

The Bulk Service Order Generation feature will create Service Orders based on service plans that exist for consumers in your agency. It will also update existing Service Orders based upon changes to Service Plans/Schedules that are conducted throughout the course of managing the consumers' plan of care.

Important Note:

The unit rate that is pulled into the Service Orders that are generated is determined as follows (this holds true for each of the three ways a Service Order can be created in SAMS):

1. If there is a contract in affect, the unit rate will always be pulled from the contract.

2. If there is no contract, the unit rate will be pulled from the provider/service record in SAMS Administrator.

3. If there is no contract and no provider/service unit rate in SAMS Administrator, the unit rate will be pulled from the service plan *(unless the order is created manually from the Consumer record, in that case no rate is pulled in).*

In addition to generating service orders for individual consumer service plans as current function in the system provides, you can use the *Generate Service Orders* feature to generate service orders in bulk for your entire agency. This is an enhancement to the system that allows select users the ability to generate many service orders at once. This was a job that Care Managers had been tasked with for individual consumers as the consumer's care plans were created or changed.

Access to this function will be restricted to select users at each agency. The organizational security will prevent a user from one agency from generating service orders from another agency's service plans. If you do not have this access and feel that you should, you can submit a URF and the Database Administrator can grant access.

➢ *To generate service orders in bulk*

I.   From the Tools menu, select Generate Service Orders.
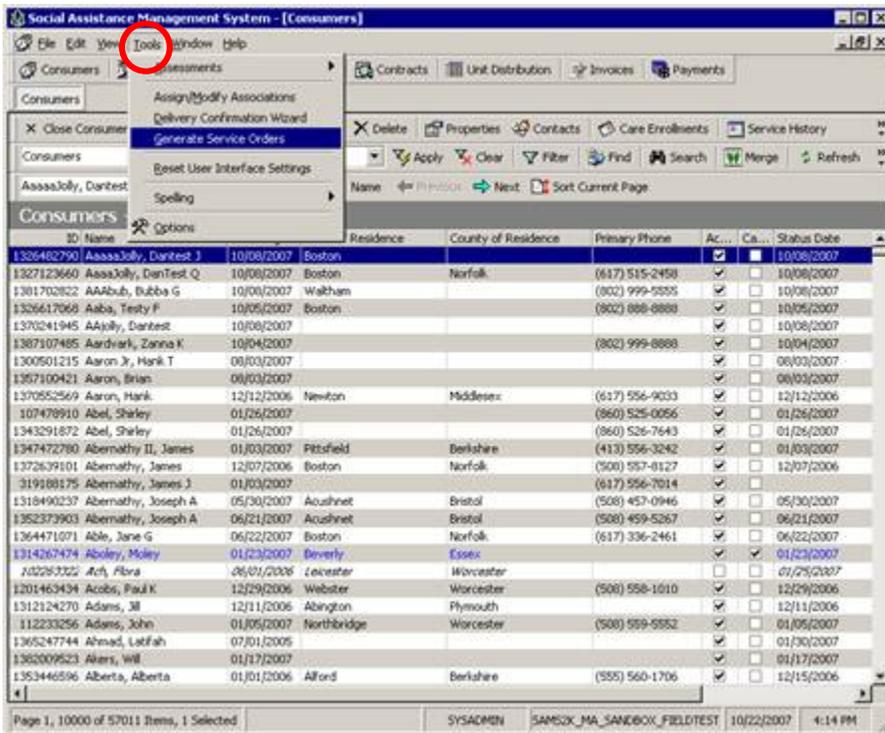
II. Enter a *Service Month*. For now, let's leave the default of the previous month. The Order Generate will work for an entire month only.

III. Enter *Agency*, *Provider*, *Service*, and *Care Program* as desired. The system will filter the lists subsequent to a filter selection to find only those combinations where an active Service Plan exists. Any service plan whose agency, provider, and service match the criteria and whose start and end dates overlap the specified period will be considered a match and will thus be in the grouping to have their Service Orders generated.

IV. Select the desired filters, creating the filtered set of Service Plans/Schedules you wish to update. You have the ability to select all service plans in your agency, or to narrow down the selection with the use of filters. When you have made your selections, click OK.

    A. The user must select from the options here. If you do not make a selection to one of these fields, the system will prompt you for more information. To select All, open the filter category and choose *Select All* from the filter dialog.

    B. Please note for Nutrition Services, that you should be careful not to order and thus authorize Holiday or Emergency meals unless appropriate.

1. Ensure that only the meal types that you wish to authorize are selected. In the picture below you can see that the holiday meals are not included.
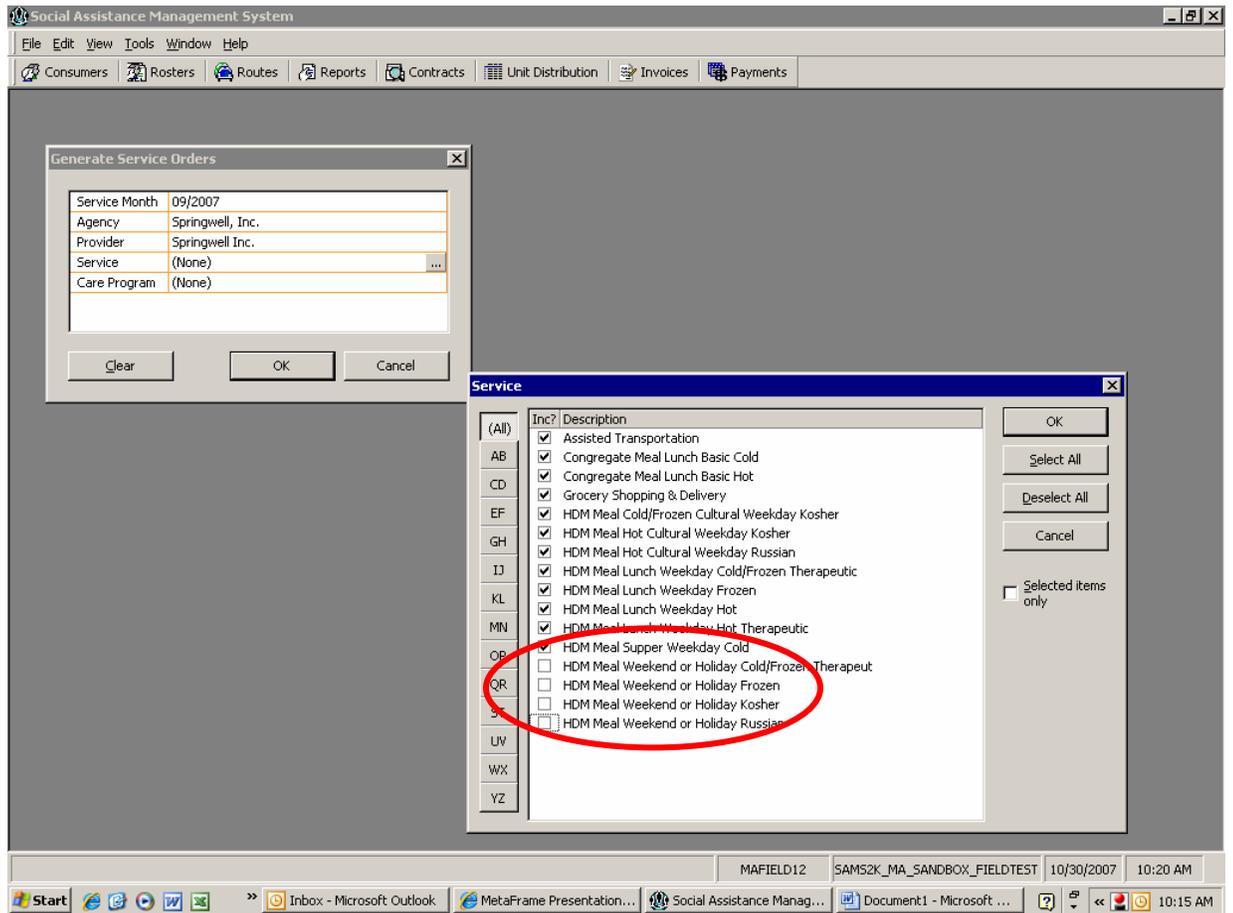
V. Click Yes to continue at the following prompt. Your Service Orders will be generated at this time.

VI.   You will see a progress bar indicating that the Service Orders are being edited/created.

VII.   The *Results* screen appears. You have the option of saving or printing your result set. Alternatively you may simply click Close Results to return to SAMS.

VIII.   You can resize the **Results** screen, as well as resize and reorder the columns just as in any SAMS list screen by clicking on column headings to sort, or using the splitter bar to resize.

IX.   The Results screen list also has type-ahead capabilities, which allows the users to find consumers or other data in the list easily. Simply click on a consumer name in the list and begin typing the last name. The user will be brought to that name on the consumer record.

X.   Exceptions will be noted in this list. The Exceptions Column will be filled out, and the entry in the results dialog will appear in Red text. The only reason that a Service Order was not generated would be that there is an existing order and it has Service Deliveries already posted against the order.

XI.   This report easily exports into a text format by choosing the *Save Report* option as indicated above. This file can be used as a text file or be opened with Excel for Windows to provide users with the ability to sort and total the results.

A.   Choose *Save Report* from the Results dialog

B.   In the *Save In* field Select **C$ on 'Client' (V:)** to specify the C: drive on your local machine. This will save the file locally where users may open the file to view.

1.   You may choose to create a folder on the local machine Called Service Orders to store the history of the Service Orders that have been generated.

C.   The Report will be named according to the agency and the Service Order Month specified by default.

D.   Click Save on the *Save Generated Orders* dialog once you have specified the desired location and name of the results file.

XII.   The output of the file is by default a text output as pictured below.

Report is TEXT FORMAT

Exception?   Client ID Name   Care Program   Agency   Provider   Service   Order No Effective Expiration
          Units Ordered   Unit Price
          301256519   "Hes-236Rice, Virginiai"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Hot   SPR0000011742   09/01/2007   09/30/2007   20.00
          $5.50
Existing order was linked to a service delivery.   812308976   "HESS212-BLEU, Rick"   Choices / Waiver
          "Springwell, Inc."   Springwell Inc.   HDM Meal Lunch Weekday Hot   SPR0000070198
          09/01/2007   09/30/2007   16.00 $5.50
          1219368776   "Fields, Sally E"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.   HDM
Meal Lunch Weekday Hot   SPR0000011693   09/01/2007   09/30/2007   20.00 $5.50
          1222183333   "HES-233, Meta"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.   HDM
Meal Lunch Weekday Cold/Frozen Therapeutic   SPR0000011566   09/01/2007   09/30/2007   20.00
          $6.00
          1300006802   "Guest1300006802, Kathleen"Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Hot   SPR0000011544   09/01/2007   09/30/2007   20.00
          $5.50
          1300006802   "Guest1300006802, Kathleen"Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Frozen   SPR0000011588   09/01/2007   09/30/2007   8.00
          $5.50
          1300014649   "Guest1300014649, Elaine"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Frozen   SPR0000011719   09/01/2007   09/23/2007   6.00
          $5.50
          1300014649   "Guest1300014649, Elaine"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Hot   SPR0000011510   09/01/2007   09/23/2007   15.00
          $5.50
          1300016738   "Guest1300016738, Walter"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Hot   SPR0000011727   09/01/2007   09/14/2007   10.00
          $5.50
          1300016738   "Guest1300016738, Walter"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Frozen   SPR0000011653   09/01/2007   09/14/2007   4.00
          $5.50
          1300030402   "Guest1300030402, Jon"   Choices / Waiver   "Springwell, Inc."   Springwell Inc.
          HDM Meal Lunch Weekday Hot Therapeutic   SPR0000011648   09/01/2007   09/30/2007
          30.00 $6.00

XIII. The file may also be opened as an Excel Spreadsheet. Putting the result set into the Excel format allows the user to quickly check the results and calculate totals of the changes. This can be compared to a Service Order report in SAMS that has filters that match the criteria specified in step IV.

    A. Right click on the file and choose *Open With*

    B. Select Microsoft Excel for Windows

Now by Adjusting the column sizes and adding some totals to the number of units, and adding the $ amounts, you can match this report to the Service Order report in SAMS to confirm that the authorized units have been correctly updated in the system.